

Step by Step:

Create Performance Plan (Employee), Transfer to Rating Official

Introduction and Audience

The guidelines below provide step by step instructions for creating a new performance plan in the DCPDS Performance Appraisal Application (PAA), acknowledging the performance plan, and transferring the plan to the rating official.

A separate guide is available covering the supervisor (rating official) steps in this process.

Performance plans can be created by either the employee or the supervisor. These guides cover both of these approaches.

Overall Process

The following table describes the overall process for establishing a performance plan.. The reference column refers to the page number in this document (Supervisor Step-by-Step Guide) or the Employee Step-by-Step Guide:

Step	Description	Performed By	Reference
1	Create performance plan, transfer to rating official	Employee	Empl-3
	Create performance plan	Rating Offcl	Supv-3
2	Enter weights, approve objectives, transfer to higher level reviewer	Rating Offcl	Supv-7
3	Review and approve (or return) plan, transfer to rating official	Higher Level Reviewer	Supv-13
4	Transfer plan to employee	Rating Offcl	Supv-16
5	Acknowledge perf plan, transfer to rating official	Employee	Empl-7
6	Approve overall plan	Rating Offcl	Supv-17

For more information, help, and problems

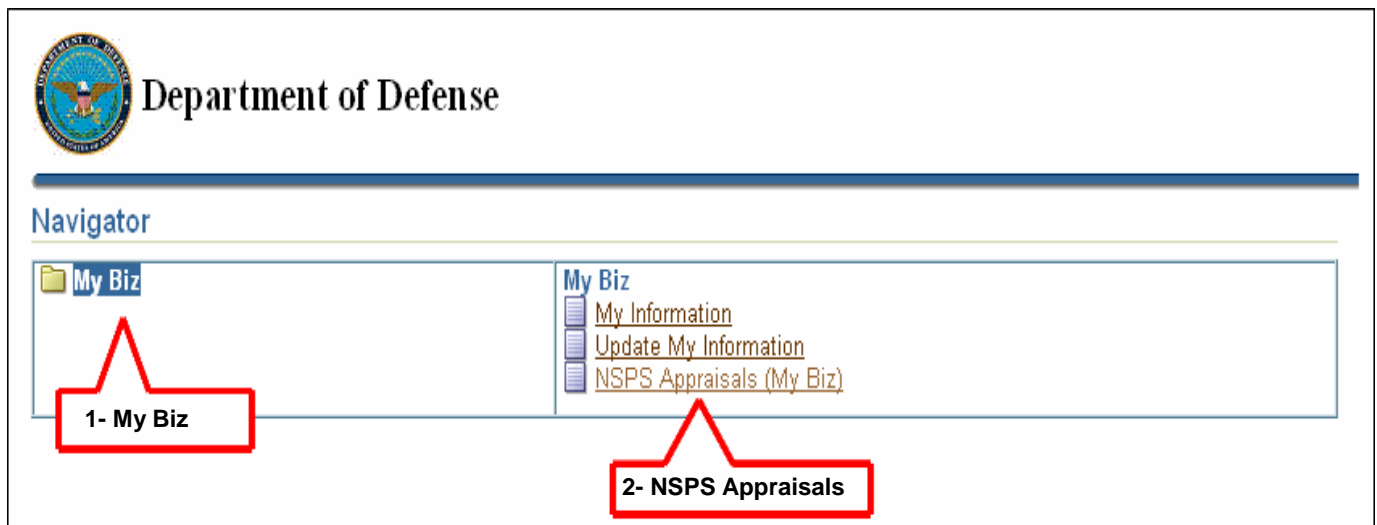
The Performance Appraisal Application (PAA) User Guide from CPMS is located at: http://www.chra.army.mil/NSPS-training/how-to_videos.htm. This guide contains thorough coverage of some of the primary tasks in the PAA and is particularly useful in describing the overall appraisal process.

Accessing the Performance Appraisal Application (PAA)

If you are not familiar with the PAA, you access it through the CPOL Employee portal, Employee tab. See the how-to guides and movies at http://www.chra.army.mil/NSPS-training/how-to_videos.htm or download the step-by-step Word guide at: http://www.chra.army.mil/NSPS-training/NSPS_Vids/MyBiz_MyWorkplace_Step_Guide_Jan07.doc

Accessing My Biz

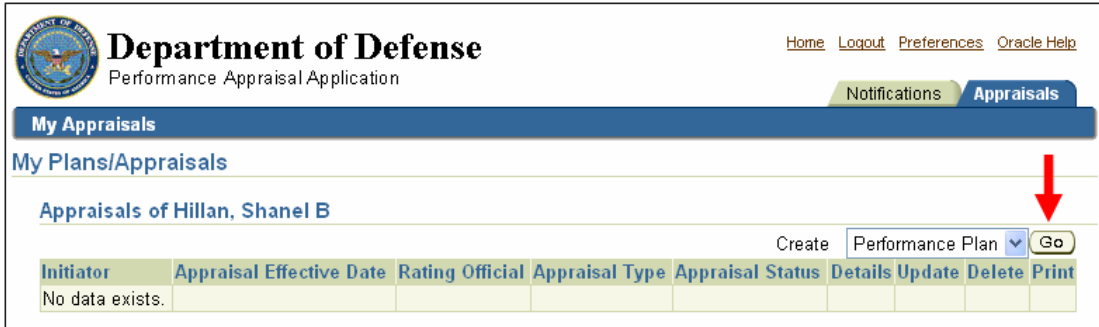
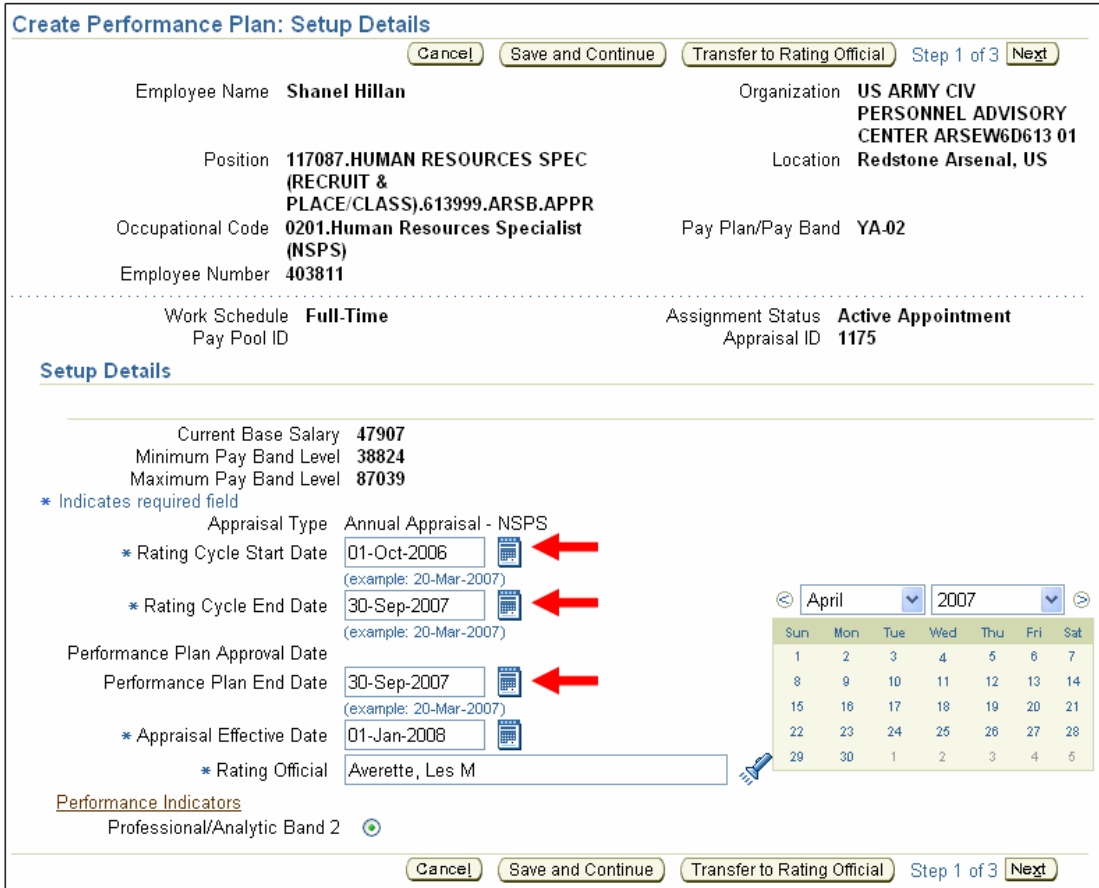
For employees, the appraisal tool is located under My Biz, which is accessed through the CPOL Portal. Instructions for accessing this application are available separately. These instructions assume that you have already entered your user ID and password to get into My Biz. Under Navigator, select the “My Biz” folder, then click the “NSPS Appraisals (My Biz)” link:



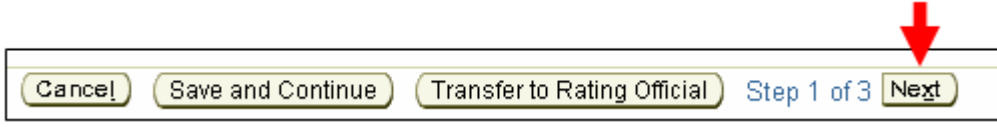
Note: If your supervisor has created your performance plan, you can skip the next section and start with the instructions in the section titled, “Acknowledge the Objectives, Return to Supervisor,” on page 7.

Create the Performance Plan

Follow the steps below to create a new performance plan:

Step	Action
1	<p>Click on the <Go> button next to "Create Performance Plan":</p> 
2	<p>Complete setup details as follows, paying particular attention to the items with arrows (use the calendar icons for all date changes, or type in the dates using the same format as shown):</p>  <p>Create Performance Plan: Setup Details</p> <p>Cancel Save and Continue Transfer to Rating Official Step 1 of 3 Next</p> <p>Employee Name Shanel Hillan Organization US ARMY CIV PERSONNEL ADVISORY CENTER ARSEW6D613 01</p> <p>Position 117087.HUMAN RESOURCES SPEC (RECRUIT & PLACE/CLASS).613999.ARSB.APPR Location Redstone Arsenal, US</p> <p>Occupational Code 0201.Human Resources Specialist (NSPS) Pay Plan/Pay Band YA-02</p> <p>Employee Number 403811</p> <p>Work Schedule Full-Time Assignment Status Active Appointment</p> <p>Pay Pool ID Appraisal ID 1175</p> <p>Setup Details</p> <p>Current Base Salary 47907</p> <p>Minimum Pay Band Level 38824</p> <p>Maximum Pay Band Level 87039</p> <p>* Indicates required field</p> <p>Appraisal Type Annual Appraisal - NSPS</p> <p>* Rating Cycle Start Date 01-Oct-2006 (example: 20-Mar-2007)</p> <p>* Rating Cycle End Date 30-Sep-2007 (example: 20-Mar-2007)</p> <p>Performance Plan Approval Date</p> <p>Performance Plan End Date 30-Sep-2007 (example: 20-Mar-2007)</p> <p>* Appraisal Effective Date 01-Jan-2008</p> <p>* Rating Official Averette, Les M</p> <p>Performance Indicators</p> <p>Professional/Analytic Band 2</p> <p>Cancel Save and Continue Transfer to Rating Official Step 1 of 3 Next</p>


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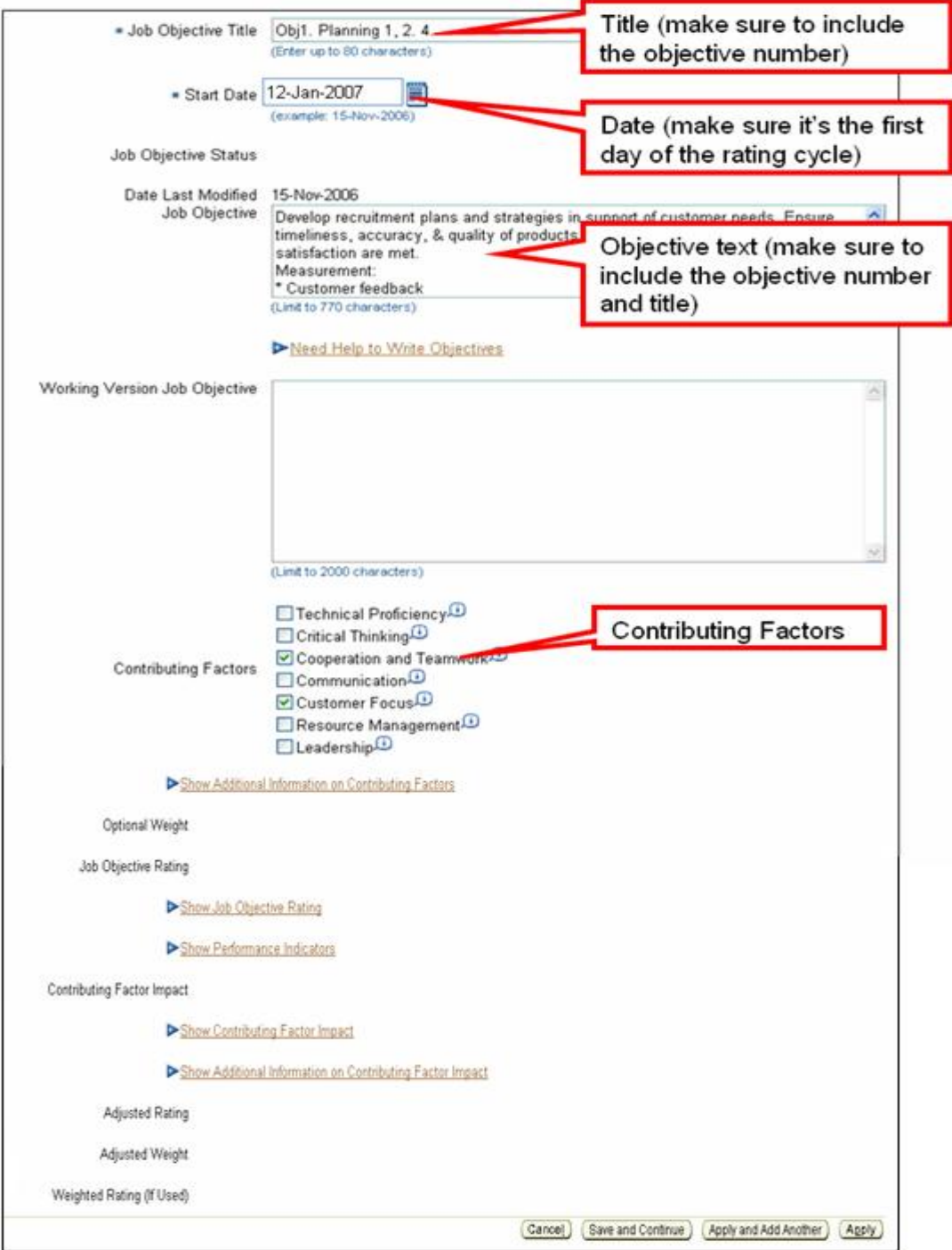
2, con't	<ul style="list-style-type: none"> • Appraisal Type: Annual Appraisal • Rating Cycle Start Date: 12 Jan 2007 (use the date your activity converted to NSPS*). • Rating Cycle End Date: 30-Sep-2007 (or 31-Oct 2007 if your organization is using an extended rating period for the first cycle). • Performance Plan End Date: 30-Sep-2007 (or 31-Oct-2007) (same as cycle end date above). • Appraisal Effective Date: Leave as 01-Jan-2008 (do <u>NOT</u> change this date). <p>* If you are a new employee, use your entry-on-duty date.</p>
3	<p>Click <Next> (at the top or bottom of the screen) to go to step 2.</p> 


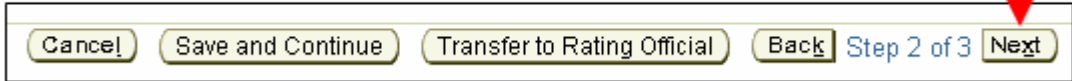

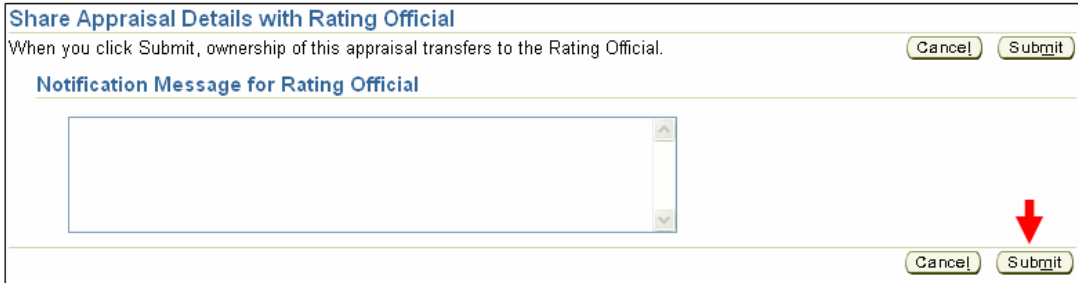
Adding the Organizational Mission / Strategic Goals and Job Objectives

Follow the steps below to add the organizational mission / strategic goals and the job objectives. Note, the mission / goals and the text of the job objectives can be copied and pasted from a fillable form version of the DD Form 2906 (if you have already set up the performance plan using that form), or from a Word document or other document. You can also type the entries in from scratch.

Note: If you are copying and pasting from Word, be sure to see the “Special Characters” section at the bottom of this document.


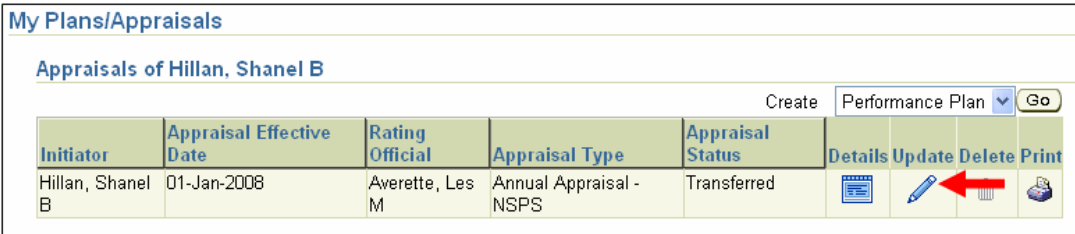
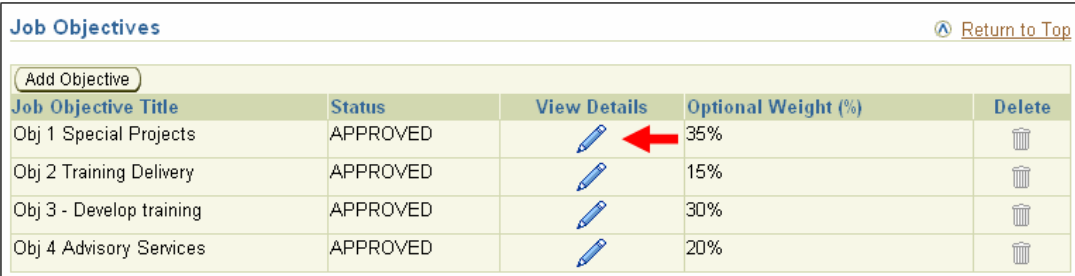
Step	Action
1	<p>Enter or paste your organizational mission / strategic goals:</p> 

2	<p>Scroll down to the Job Objectives section and click the <Add Objectives> button (see illustration above).</p>
3	<p>Complete the job objective screen as shown:</p> <p>(Including the objective number and title in the job objective text block will insure that it prints on the printed appraisal form.)</p>  <p>The screenshot shows the 'Job Objectives' form with the following fields and callouts:</p> <ul style="list-style-type: none"> Job Objective Title: Obj1. Planning 1, 2, 4. (Enter up to 80 characters). Callout: Title (make sure to include the objective number) Start Date: 12-Jan-2007. (example: 15-Nov-2006). Callout: Date (make sure it's the first day of the rating cycle) Job Objective: Develop recruitment plans and strategies in support of customer needs. Ensure timeliness, accuracy, & quality of products. Measurement: * Customer feedback. (Limit to 770 characters). Callout: Objective text (make sure to include the objective number and title) Contributing Factors: <ul style="list-style-type: none"> <input type="checkbox"/> Technical Proficiency <input type="checkbox"/> Critical Thinking <input checked="" type="checkbox"/> Cooperation and Teamwork <input type="checkbox"/> Communication <input checked="" type="checkbox"/> Customer Focus <input type="checkbox"/> Resource Management <input type="checkbox"/> Leadership Callout: Contributing Factors <p>Other fields visible include: Job Objective Status, Date Last Modified (15-Nov-2006), Working Version Job Objective (Limit to 2000 characters), Optional Weight, Job Objective Rating, Contributing Factor Impact, Adjusted Rating, Adjusted Weight, and Weighted Rating (if Used). Buttons at the bottom include Cancel, Save and Continue, Apply and Add Another, and Apply.</p>

4	<p>Click the <Apply and Add Another> button (at the bottom of the screen):</p> 
5	<p>Repeat steps 3 and 4 for each objective. After entering the last objective, click the <Apply> button rather than the <Apply and Add Another> button.</p>
6	<p>Click <Next> (at the top or bottom of the screen) to go to step 3.</p> 
7	<p>Step 3 is the “Review” screen. If you need to make any changes, use the <Back> button to return to previous screens. If everything looks OK, click on the <Transfer to Rating Official> button at the top or bottom of the screen:</p> 
8	<p>Click the <Submit> button (either one) to transfer the plan:</p> 

Acknowledge the Objectives, Return to Supervisor

Once the supervisor has weighted and approved the objectives and obtained Higher Level Review approval, he/she will return the plan to you. Follow these steps to acknowledge the performance plan:


Step	Action
1	<p>Log into My Biz, and then select NSPS Appraisals (My Biz).</p> 
2	<p>On the “My Plans / Appraisals” screen, click on the blue pencil to open your performance plan (if the pencil is grayed out, your supervisor still has possession of your plan; you will not be able to do this until it is transferred to you):</p> 
3	<p>If desired, scroll down to the job objectives area, and click on the top (first) blue pencil to review the first job objective. You can also see the weights that have been applied.</p> 

4	<p>When the objective screen is displayed, you have the following options:</p> <div data-bbox="446 235 1279 321"> </div> <p>Use <Cancel> to exit from the job objective review screen. Use <Apply and Update Next> to view the next job objective. Use <Apply> when you are done reviewing the last objective.</p> <p>You should not be making any changes to the approved job objectives at this point.</p>
5	<p>Click the <Continue> button (top or bottom of the screen).</p> <div data-bbox="428 646 1321 722"> </div>
3	<p>Scroll down to the bottom of the screen to the approvals and acknowledgements area, and click the <Acknowledge> button. This is your acknowledgement that you have received your job objectives (it does not mean you agree with them).</p> <div data-bbox="326 863 1395 1079"> </div>
4	<p>The <Acknowledge> button will become grayed out and Emp Ack Date will be automatically filled in. Click the <Transfer to Rating Official> button:</p> <div data-bbox="326 1173 1395 1404"> </div>
4	<p>Click the <Submit> button (either one) to effect the transfer:</p> <div data-bbox="326 1457 1395 1740"> </div>

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You will see a confirmation that your plan has been submitted to the rating official, and your update pencil will be grayed out, meaning you no longer have possession of the performance plan.


Confirmation


The appraisal has been submitted to the rating official. 






My Plans/Appraisals

Appraisals of Hillan, Shanel B

Create

Performance Plan 

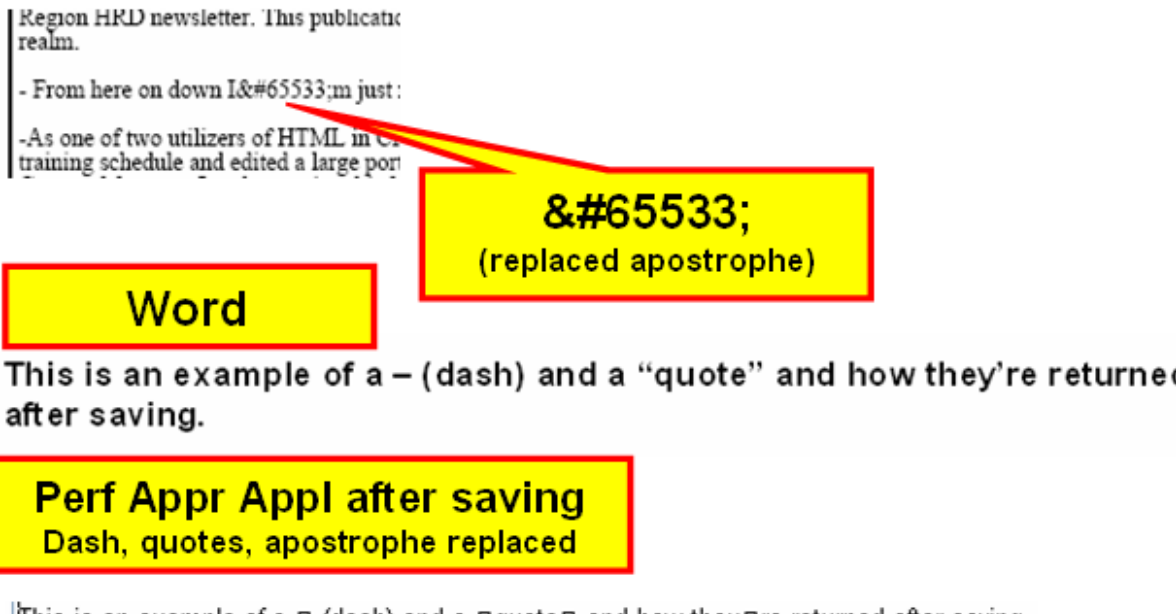
Go 

Initiator	Appraisal Effective Date	Rating Official	Appraisal Type	Appraisal Status	Details	Update	Delete	Print
Hillan, Shanel B	01-Jan-2008	Averette, Les M	Annual Appraisal - NSPS	Ongoing			 	

Special Characters

Certain “special characters” are present in some assessments that were prepared and copied into the PAA from Microsoft Word. These include smart quotes, long dashes, and apostrophes among others. In the PAA, other characters are substituted for these characters whenever an appraisal is saved. For the most part, these are “cosmetic” issues that don’t affect the substance of the assessments, but in some cases, it may change the meaning of the text.

If you have special characters in the appraisal and want to remove them and replace them with their “non-special” equivalents (a hyphen for a long dash, regular straight quotes for “smart quotes,” etc.), you can search the text blocks for any of the characters shown below. The PAA will replace special characters with either �, or with a small box.



The screenshot shows a document with the following text:

Region HRD newsletter. This publicatio
realm.

- From here on down I�m just :

-As one of two utilizrs of HTML in C
training schedule and edited a large port

A red arrow points from the text "I�m" to a yellow box containing the text: **�**
(replaced apostrophe)

Below this is another yellow box containing the text: **Word**

Below that is a paragraph: This is an example of a – (dash) and a “quote” and how they’re returned after saving.

Below that is a yellow box containing the text: **Perf Appr Appl after saving**
Dash, quotes, apostrophe replaced

At the bottom is a paragraph: |This is an example of a □ (dash) and a □quote□ and how they□re returned after saving.